

STATE OF TENNESSEE

EDISON SYSTEM PROCEDURES

Contract Notifications — Understanding Contract Notifications

A.1. Understanding Contract Notifications

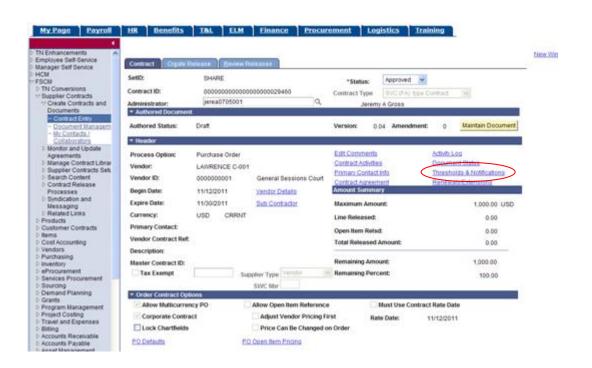
Supplier Contracts > Create Contracts and Documents > Contract Entry



Step	Action
1	Click the Find an Existing Value tab
2	NOTE: Set ID will default as SHARE
3	Key in Contract ID
4	Click the Search button.

A.1. Understanding Contract Notifications (cont)

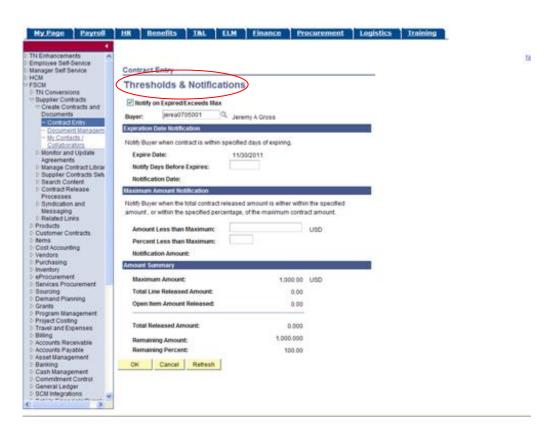
Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)



Step	Action
5	Contract Administrators have the ability to be notified when Contracts are expiring and when Contracts have a designated amount of the Contract amount released and unavailable to spend. The <i>Notifications</i> can be established on the Threshold and Notifications page within the Supplier Contracts page. Notification is established on a contract basis.
6	Once on the Threshold and Notifications page for a Contract, the Contract Administrator can select a checkbox to signify that they want to receive Notifications .
7	By selecting the Checkbox that you would like <i>Notifications</i> turned on, the ID listed as the Contract Administrator will receive <i>Notifications</i> on two criteria; the Expire Notification Date and the Maximum Amount Notification Amount .

A.2. Expire Notifications

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)



Step	Action
8	A single Notification will be generated on the calculated Notification Date .
9	The <i>Notifications</i> Date is calculated based on how many days less than the Expiration Date you wish to be notified.
10	If the "Notify Days Before Expires" field is blank, then the Notification will generate on the Expire Date.
	If no value is entered in the "Notify Days Before Expires", the value is considered "0" days less than the Contract Expire date. Thus, zero days less than the Expire Date is the expiration date.

A.3. Maximum Amount Notification

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)

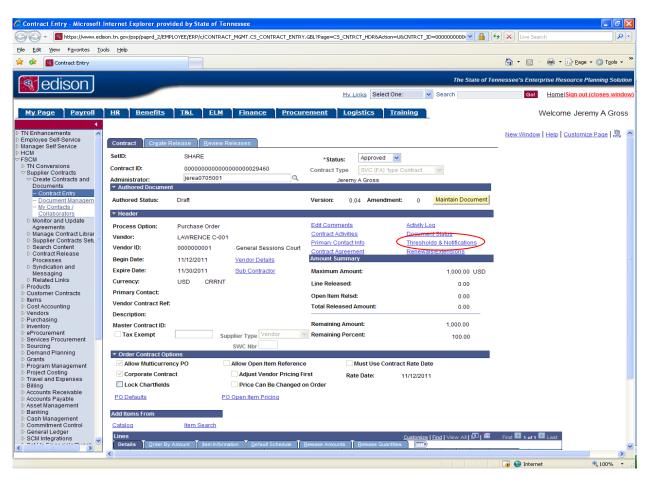
Step	Action
11	A Notification will be generated every time the Notification Process runs and the
	Total Released Amounts are greater than or equal to the Notification Amount .
12	A Notification will be generated every day the criteria is true for the Notification Amount .
13	The Notification Amount is based on the percentage less than the Maximum Amount to spend on the Contract or a designated amount.
14 **	If the Notification Amount field is blank, then the Notification will generate when the Released Amount equals the Maximum Amount of the Contract. It will generate each day the Notification is selected and there is no Available Amount on the Contract.
	If no value is entered in the "Notification Amount", the value is considered "0" percent and also when an amount less than the Maximum Amount is entered. Thus, zero percent or dollars less than the Maximum Amount is the maximum amount.
	Please put the maximum amount of your contract in the "Amount Less than Maximum" field to prevent unwanted emails.

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)

Step	Action
15	Only one criterion must be met for a <i>Notification</i> to be generated.
16	The page's fields are "Open" and available for change regardless of the Contract's status.
17	Once a <i>Notification</i> is generated and the <i>Notification</i> is in a worklist, the <i>Notification</i> can be removed from the worklist. To remove the worklist <i>Notification</i> , the user should perform the following: 1. Click on the link on the worklist <i>Notification</i> 2. User will be taken to the Contract page 3. Click <i>Save</i> on the Contract 4. The worklist <i>Notification</i> is removed

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)

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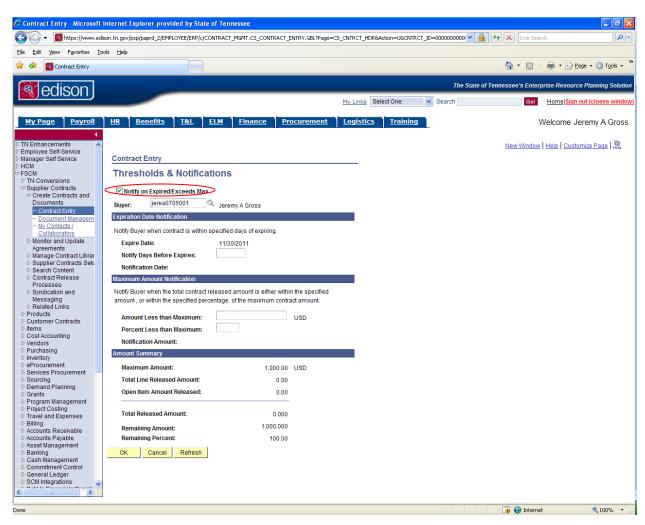


The *Notification* can be disabled by unselecting the checkbox "Notify on Expire/Exceeds Max"

Amount *Notification* will be generated daily as long as the criteria are met. However, if a Contract Amendment is processed and the Maximum Amount of the contract is increased, the percentage criteria could change and the notification amount may change. On any contract amendment when a contract has Threshold and Notifications enabled, check the notification amount after the Max Amount increase to ensure the desire value is entered.

20	For Contracts that do not have a Maximum Amount (such as unlimited amount
	Contracts or Statewide Contracts), the Amount Notification will be irrelevant. Since
	there is no amount to reach for a <i>Threshold Notification</i> , the <i>Notification</i> will never be
	generated based on the <i>Amount Notification</i> . A buyer may still use the <i>Expire</i>
	Notifications for these types of Contracts.

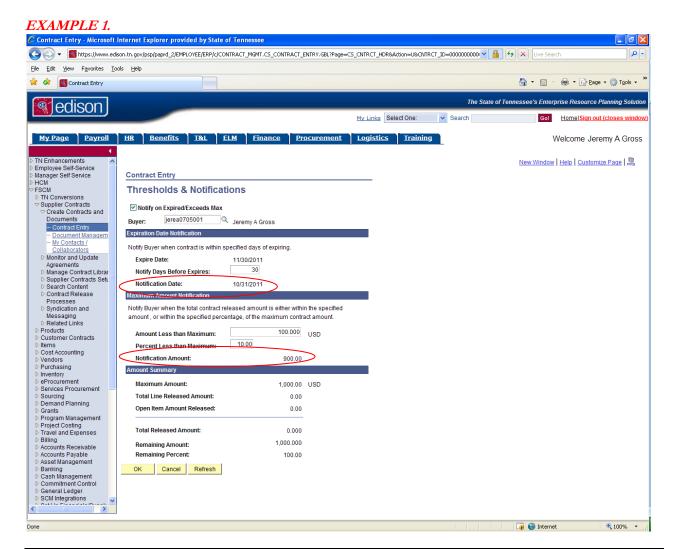
Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications-Notify on Expire/Exceeds Max)



21	Checkbox titled "Notify on Expire/Exceeds Max" needs to be selected
22	Buyer (Contract Administrator) The buyer cannot be assigned specifically for the <i>Notification</i> . The buyer is the Contract Administrator. If the buyer "Name" is changed, it will also change the <i>Contract Administrator Name</i> on the Contract as well.

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications>Expire Notifications)

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23 Example 1

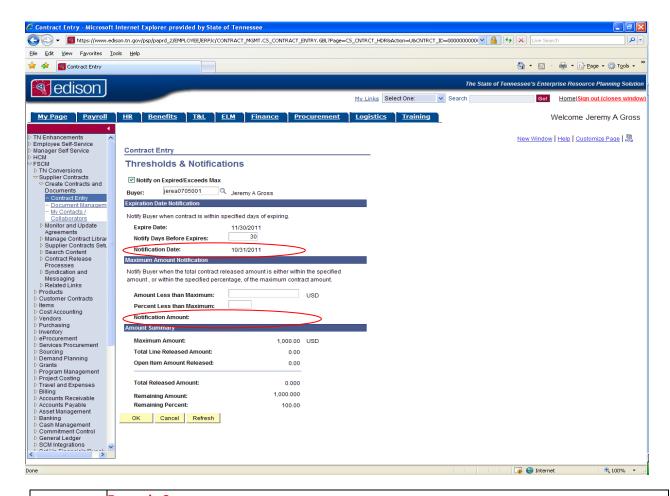
Expire Notification – A single **Notification** will be generated on the **Notification Date** of 10/31/11 from the **Expire Notification**

24	Maximum Amount Notification – No Notification will be generated based on the Max Amount Notification at this time.
	A Notification will be generated once and if the Total Released is \$900.00 or greater.
	The Notification will be generated every time the Notification Process runs and the
	Total Released Amounts are greater than or equal to the Notification Amounts .

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications>Expire Notifications – Notification Amount Blank)

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EXAMPLE 2.



Example 2

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Expire Notification – A single **Notification** will be generated on the **Notification Date** of 10/31/11 from the **Expire Notification**

Maximum Amount Notification – No Notification will be generated based on the Max

Amount Notification at this time. Though the Notification Amount is blank, the value is actually \$1,000.00. See explanation in the next section.

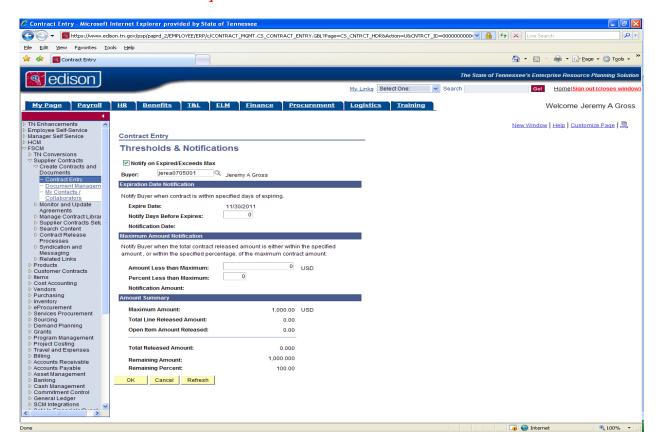
A Notification will be generated once and if the Total Released is \$1,000.00 or)the Contract's Full Maximum Amount

The Notification will be generated every time the Notification Process runs and the Total Released Amounts are greater than or equal to the Notification Amounts.

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications>Expire Notifications - Notification Amount Blank)

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EXAMPLE 2 - Blank Field Explanation



Example 2. Blank Field Explanation

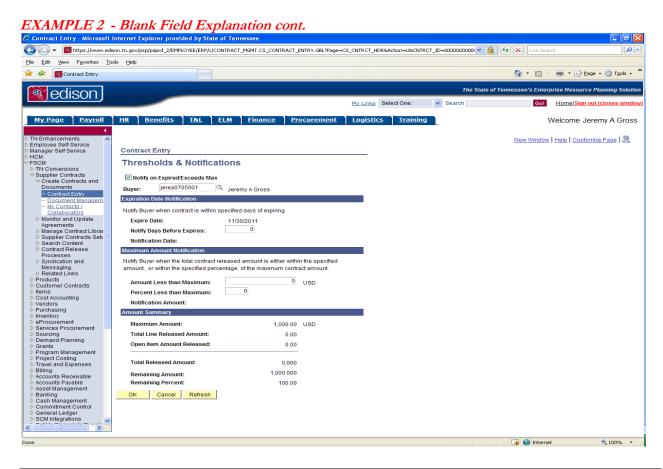
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Blank Fields for Notify Days Before Expires, Amount Less than Maximum and Percent Less Than Max represents the value of zero ("0").

28 Expiration Date Notification – Since blank field is zero, "0" Days less than the Expire Date would be the Expire Date. A Notification would be generated on 11/30/2011 (the actual expiration date).

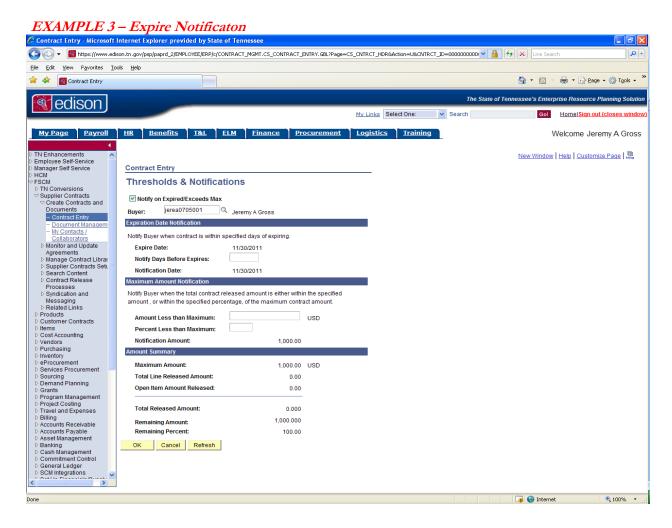
Maximum Amount Notification - Since blank field is zero, "0" Amount Less than or Percent Less than the Maximum Amount is the Full Maximum Amount. A Notification would be generated when the Total Released Amount is \$1,000.00 (the Maximum Amount).

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications>Expire Notifications - Notification Amount Blank)



	Example 2. Blank Field Explanation cont.
29	The above screen shows the Notification Date and Notification Amount as if an Actual zero "0" was entered.
30	Expiration Date Notification – the Expire Date
	Maximum Amount Notification – the Maximum Amount of the Contract

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications>Expire Notifications - Notification Amount Blank)

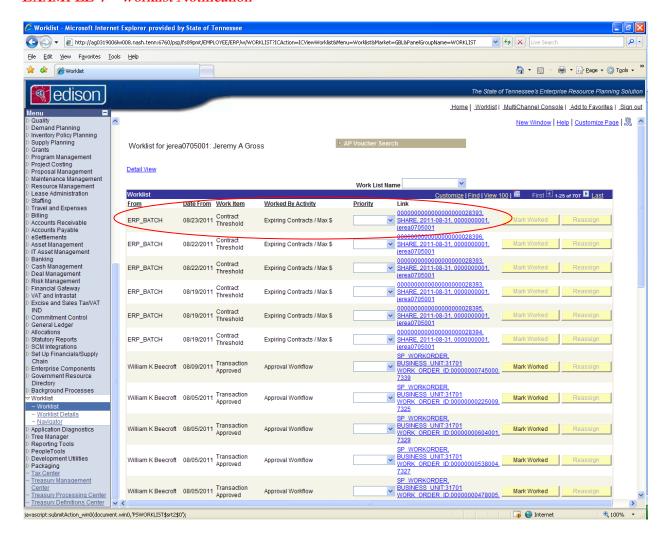


	Example 3. Expire Notification
29	Expire Notification – A single Notification will be generated on the Notification Date of 11/30/11 from the Expire Notification
30	Maximum Amount Notification – A Notification will be generated once and if the Total Released Amount is \$900.00 or greater. The Notification will be generated every time the Notification Process runs and the Total
	Released Amounts is greater than or equal to the <i>Notification Amounts</i> .

Worklist > Detail View

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EXAMPLE 4 - Worklist Notification



Example 4. Worklist Notification

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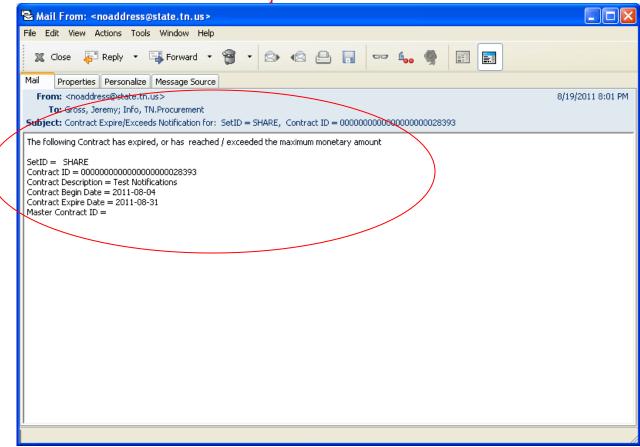
Worklist Notification – Expire Notification will be generated in the Contract Administrator's **Worklist** for each **Contract**.

Contract Administrator and other authorized users should access State Email Account to view

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EXAMPLE 5 – Email Notification Example

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Example 5. Email Notification

Worklist Notification – Expire Notification will be generated in the Contract

Administrator's Email Account for each Contract.